

**Department of Personnel Administration  
Memorandum**

**TO: Personnel Management Liaisons (PML)**

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| <b>SUBJECT:</b><br>Bar Association Dues Reimbursement | <b>REFERENCE NUMBER:</b><br>2004-072 |
| <b>DATE ISSUED:</b><br>12-20-04                       | <b>SUPERSEDES:</b><br>2004-064       |

This memorandum should be forwarded to:

**Accounting Officers  
Employee Relations Officers  
Travel and Relocation Liaisons**

**FROM:** Department of Personnel Administration  
Labor Relations Division

**CONTACT:** Jacquelyn Sanders, Senior Labor Relations Officer  
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This memo describes the amount the State will pay toward 2005 State Bar membership dues, and related provisions. ***The State Bar's deadline for payment of 2005 membership dues is February 1, 2005.***

***1. How much of the 2005 dues will the State pay for?***

Departments are required to pay **\$380** of the 2005 State Bar membership fee of \$390 for employees in Bargaining Unit 2 and affiliated excluded employees if State Bar membership is required as a condition of employment.

The State does **not** pay:

- the \$10 portion that funds the State Bar's lobbying efforts or communications with voluntary bar associations;
- optional donations to the Conference of Delegates of California Bar Associations, Foundation of the State Bar, or the California Supreme Court Historical Society; nor
- penalties resulting from late payment of dues, unless the State is responsible for the late payment.

For employees who work less than full time, or less than one year, your department may prorate the reimbursement.

***2. Will the State pay local or specialty bar dues?***

In addition to the State bar dues described above, the State will pay up to \$100 annually for job-related local or specialty bar dues, if State Bar membership is required as a condition of employment.

Excluded employees may be reimbursed for job-related local or specialty bar dues at the discretion of your department. In such cases, your department also determines the reimbursable amount. The amount is prorated for employees working less than full time.

**3. What if State Bar membership is not required as a condition of employment?**

For rank-and-file employees in Bargaining Unit 2 who are **not** required to be members of the State Bar as a condition of employment, your department may provide one of the following:

- a. reimbursement of the \$380 portion of State Bar dues described in Question 1 (\$50 for an "inactive" membership); **or**
- b. two days of professional leave per calendar year without loss of compensation.

Option "a" is available only for employees who are eligible to be State Bar members. Unit 2 employees who are not attorneys are entitled to option "b" only.

Your department may prorate professional leave for employees who work less than full time and/or less than a full year.

Professional leave must be requested and approved in the same manner as vacation or annual leave. Professional leave credit shall not carry over from year to year.

**4. What are the methods of reimbursing or paying bar dues?**

**Direct payment:** Your department may pay membership fees directly to the State Bar, following the procedures outlined below. However, use the reimbursement method (described below), **not** direct payment, for employees choosing to pay any optional fees (itemized on lines 19-23 of the membership dues statement).

- a. No later than January 4, 2005 (which is four weeks before the February 1 payment deadline), employees must provide the original remittance (coupon) portion of their membership dues statement to the person designated by your department to handle payment of bar dues. Lines 19, 20, and 21 must show "0" to indicate that no optional payments are included, and line 22 ("lobbying") and line 23 ("bar relations and elimination of bias") must show that \$5 has been deducted for each of these items.
- b. Prepare a list of employees for whom the department is paying State Bar dues, batch the coupons, and prepare one check for dues and section fees, payable to "California State Bar." Send the check, list, and batched coupons together in one envelope addressed to:

State Bar of California  
Attention: Membership Services  
180 Howard Street  
San Francisco, CA 94105-1639

- c. If your department receives an employee's membership dues statement after January 4, 2005, the department still has the option to pay the dues directly, or it may reimburse the employee, as described below.

**Reimbursement:** Your department may reimburse individual employees. Employees who request reimbursement must include proof of payment, a copy of their annual membership dues statement, and a copy of their membership card.

***5. Are excluded employees entitled to other reimbursement?***

In addition to any bar or specialty dues described above, excluded employees are entitled to reimbursement for up to \$100 annually for membership dues of a professional organization or for a job-related professional license fee that is directly related to the employee's professional discipline.

***6. Where can I find more information on this topic?***

The information in this memo is based in part on Article 13.7 of the [Bargaining Unit 2 contract](#) and Title 2, sections [599.921](#) and [599.922.2](#) of the California Code of Regulations.

If you have further questions, please contact Jacquelyn Sanders at the number or email listed at the top of this memo.

/s/Dave Gilb

Dave Gilb  
Chief of Labor Relations